

**Achievement of Market-Friendly Initiatives and Results Program
Funded by U.S. Agency for International Development**

**CEO LEADERSHIP TRAINING OUTLINE
for
EXCELLENCE INC.**

Final Report

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FORWARD

This draft report was prepared by Larry Milner under the direction of Andrew Kaiser, Center of Excellence Program manager and Greta Boye, PSPI Component Leader and Chemonics International, prime contractor and TSG (The Services Group), subcontractor to the U.S. Agency for International Development for the AMIR Program in Jordan.

DATA PAGE

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EXCELLENCE INC.
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Government Affairs
Membership Development and Recruiting
Mission, Objectives, Documents
Organizational Structures
Pillars of Excellence

ABSTRACT

This report contains a suggested outline to be used for training a new Chief Executive Officer for the about-to-be-formed non-governmental organization with the trade name EXCELLENCE INC.

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EXECUTIVE SUMMARY

This report contains a suggested outline to be used for training a new Chief Executive Officer for the about-to-be-formed nongovernmental organization with the trade name EXCELLENCE INC. The outline includes Web sites, books, resources, and other helpful learning devices for the new executive. It also outlines the “Keys for Success” that will help develop an understanding and an appreciation for the complexities of management an NGO. In addition, the duties and the qualities of a Chief Executive Officer are listed.

RESOURCES FOR CHIEF EXECUTIVE OFFICER TRAINING

PUBLICATIONS

Andringa, Robert C. and Ted W.Engstrom. *Nonprofit Board Answer Book*. National Center for Nonprofit Boards, Washington, D. C., 1998.

Business Associations in the 21st Century: A Blueprint for Their Future by Larry Milner, CAE (Available for AMIR Business Management Initiative, Amman, Jordan

Dunlap, James J. *Leading the Association: Striking the Right Balance Between Staff and Volunteers*. American Society of Association Executives, Washington, D. C., 1989.

Eadie, Douglas C. *The Extraordinary CEO*:. American Society of Association Executives, Washington, D. C., 1999.

Ernstthal, Henry and Vivian Jefferson, eds. *Principles of Association Management: A Professional Handbook*. American Society of Association Executives, Washington, D. C., 1988.

Managing the Nonprofit Organization: Principles and Practices by Peter Drucker (Available from AMAZON.com)

Milner, Larry S. ed. *Business Associations in the 21st Century: A Blueprint for the Future*. Center for International Private Enterprise, Washington, D.C., 1997.

Pilgrim, Markus and Ralf Meier. *National Chambers of Commerce: A primer on the Organization and Role of Chamber Systems*. Center for International Private Enterprise, Washington, D. C., 1995.

Principles of Association Management (Available form American Society of Association Executives)

Private Enterprise, Washington, D. C.

Richards, Randall R. *How to Build an Effective Board*. American Society of Association Executives, Washington, D. C., 1997.

Roberts, Arthur A. *Operating the Volunteer Organization: The Dynamics of the Successful Management of a Volunteer Organization, Book 1: Paid Staff*. U.S. Chamber of Commerce, Washington, D. C., 1996.

The Courage to Lead: An Essential Guide for Volunteer Leaders, Board Trustees, and Public Servants by Robert A. Floyd, CAE

WEB SITES

www.cipe.org/vba A site that is produced by the Center for International Private Enterprise and has a Virtual Business Association format with answers to organizational questions.

www.nonprofits.org A site maintained and continually updated by Center for Nonprofit Boards and has an excellent Frequently Asked Questions (FAQ) section that has many articles on every conceivable management topic.

www.asaenet.org A site that is maintained by the American Society of Association Executives that has books on all subjects dealing with NGO management.

ORGANIZATIONS

The Center for International Private Enterprise, Washington DC

The Center for Nonprofit Boards, Washington DC

The U.S. Chamber of Commerce, Washington DC

The American Society of Association Executives, Washington DC

THEORETICAL TITLES FOR A CHIEF EXECUTIVE OFFICER

- ? The keeper of the NGO's organizational philosophy
- ? The primary protector of the money supply
- ? A full partner with the Chair
- ? A leader for the membership
- ? An advocate for the industry

KEYS TO SUCCESS FOR A NON-GOVERNMENTAL ORGANIZATION

A Chief Executive Officer must have:

- ? A clear understanding the CEO, the Chair, the Board and the staff of the vision and the mission of the NGO
- ? A partner relationship between the CEO and the Chair
- ? An understanding by the CEO that he or she is the major source of knowledge and details about all the programs, activities and administration of the NGO
- ? A strong knowledge and an insistence on using good meeting management principles
- ? A strong personal relationship between the CEO and each of the directors
- ? A constant effort to improve the effectiveness and the efficiency of the NGO
- ? A comprehensive knowledge of the NGO's financial condition
- ? A willingness to report often and accurately on the RESULTS of the efforts of the NGO
- ? An understanding of where the NGO is on the life cycle of the organizational curve
- ? An understanding of what gives the NGO real power

LEADERSHIP AXIOMS FOR CHIEF EXECUTIVE OFFICER

The single most important factor in determining the climate of an organization is the top executive.

—Charles Galloway

People support what they help create. I am convinced that the surest way to establish a sense of ownership among your constituency is to involve them in the creative process, all along the way. You might be able to reach a goal faster on your own, but when you get there you will be just that—on your own. Slow down and take your people along.

-John Maxwell

Leadership 101: Everything rises and falls on leadership. Once a leader has been directing an organization for two years or more, the personality, atmosphere, and problems of that organization are a result of his leadership. When you see him, you see the organization.

—John Maxwell

A good leader can step on your toes without messing up your shine. Real leaders seem to have the keen ability to speak the truth, to lay out the imperatives and to communicate the marching orders to their people. At the same time, they do so with such warmth and understanding, with such humor and sensitivity, that no one feels pushed. They actually like the experience. They feel they are better for it.

Leaders and Leadership: As for the best leaders, the people do not notice their existence. The next best, the people honor and praise. The next, the people fear, and the next the people hate. When the best leader's work is done, the people say, "we did it ourselves."

- Lao-Tzu

The Harper Book of Quotations

:

CHARACTERISTICS OF THE SUCCESSFUL CHIEF STAFF OFFICER

A successful chief staff officer:

- ? Has good communication skills.
- ? Has high ethical and moral character and dependability.
- ? Has the ability to measure existing programs and problems of members and knows the importance of planning for change.
- ? Not only "gets along" with people, but is able to analyze, predict and influence people and the outcome of events.
- ? Has leadership talents that can convince others of the desirability of goals and objectives so volunteers will follow because of abilities and ideas.
- ? Has creative ability that changes the outcome of events.
- ? Has good communication skills.
- ? Takes calculated risks.
- ? Understands "level 5" leadership.
- ? Empowers staff.

FUNCTIONS OF THE CHIEF EXECUTIVE OFFICER

- ? Implementation of the strategic goals and objectives of the organization
- ? With the chair, enables the Board to fulfill its governance function
- ? Direction and leadership toward the achievement of the organization's philosophy, mission, strategy, and its annual goals and objectives
- ? Reports to: Board of Directors
- ? Board Administration and Support -- Supports operations and administration of Board by advising and informing Board members, interfacing between Board and staff, and supporting Board's evaluation of chief executive
- ? Program, Product and Service Delivery -- Oversees design, marketing, promotion, delivery and quality of programs, products and services
- ? Financial, Tax, Risk and Facilities Management -- Recommends yearly budget for Board approval and prudently manages organization's resources within those budget guidelines according to current laws and regulations
- ? Human Resource Management -- Effectively manages the human resources of the organization according to authorized personnel policies and procedures that fully conform to current laws and regulations
- ? Community and Public Relations -- Assures the organization and its mission, programs, products and services are consistently presented in strong, positive image to relevant stakeholders
- ? Fundraising (nonprofit-specific) -- Oversees fundraising planning and implementation, including identifying resource requirements, researching funding sources, establishing strategies to approach donors, submitting proposals and administrating fundraising records and documentation

DUTIES AND AUTHORITY OF THE CHIEF EXECUTIVE OFFICER

- ? Administer programs approved by the directors to promote and protect the welfare of the members.
- ? Prepare reports and agenda for board meetings, annual membership meetings, and other conferences or special meetings designated by directors.
- ? Be responsible for having minutes recorded of all meetings of the board of directors or other designated meetings of official bodies of the association.
- ? Develop and recommend new policies or changed policies for consideration by the directors and membership.
- ? Prepare and submit for the directors' consideration an operating budget for the organization's next fiscal year, and maintain and administer proper accounting procedures for the receipt and disbursement of funds.
- ? Directors should evaluate the CSO's performance each year. It should be based on the performance of duties established in his or her job description. The review should be performed by a small group of key officers. Unfortunately, volunteers, placing the CSO in a very uncomfortable position, sometimes ignore the performance review. Without such a review, the CSO has little opportunities for pay increases or for knowing how to improve his or her performance.
- ? Collect and disseminate all appropriate information that will be beneficial to members' business or professional activities.
- ? Hire personnel necessary to carry out association programs and services.
- ? Inform directors on unexpected changes affecting the industry, profession, or community.
- ? Assume full responsibility for purchase of equipment and supplies necessary to maintain and carry out the association's operation.
- ? Originate and carry out a program of membership solicitation and retention.
- ? Have a comprehensive knowledge of the legislative, administrative, and technical policies and regulations governing operation of the association.
- ? Plan, direct, and organize beneficial programs for association members in the field of management or technical subjects.
- ? Maintain contact with government officials, and monitor legislative developments, operations, and actions of government agencies.
- ? Prepare and submit to the membership an annual report of the organization's activities and accomplishments.
- ? Prepare an annual financial report.
- ? Establish regularly scheduled updates to an organization's external and internal Policy Manual for reference by leadership.
- ? Establish job descriptions for all association staff employees.
- ? Prepare a staff policy manual reflecting all organization internal policies.
- ? Maintain a close liaison with all news media.
- ? Exercise good judgment, inspire associates, and operate at a high ethical and moral level.

MAJOR RESPONSIBILITIES FOR THE CHIEF EXECUTIVE OFFICER

- ? Provide business and technical analysis and design, coordination, and control with limited supervision. Works on projects up to one man year in size or segments of projects greater than one man year. Supervise 0-2 people.
- ? Business and Technical Analysis
- ? The Systems Analyst is also responsible for the business and technical analysis of the system. They must work well with the different departments and understand their needs.
- ? Technical Design
- ? Systems Analysts are responsible for the technical design of systems. A thorough understanding of the technical requirements of the system and the capabilities of the machine are necessary to successfully fulfill this requirement.
- ? Limited Supervision on Projects
- ? The Systems Analyst provides supervision on projects that generally are not more than one man year in duration. They may have responsibility for staff and pieces of projects that extend beyond one man year in scope.